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Experiences That Enable One to Become an Expert Strategic Thinker

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Abstract

Strategic thinking is a skill needed by leaders at all levels of the organization. In this qualitative study, 10 experienced ministers were interviewed and identified the characteristics that were most important to the development of their expertise. The eight key experiences contributing to the development of the ability to think strategically for the study's participants were Being Mentored, Other Ministers, Spiritual Discernment, Education, Practical Ministry Experience, Challenging Experiences, Experience in Other Cultures, and Reading Books. Recommendations are made for developing strategic thinking skills.

Introduction

Many leaders lament that “we need more strategic thinkers”. Capstone courses are offered in many bachelor and graduate programs to help students pull together all the details they have learned and develop their strategic thinking skills, but many are dissatisfied with their effectiveness (Blaney, 2012; Jones, 2007; Singh, 2012). Strategic thinking has long been considered a leadership responsibility, and the development of strategic thinking in people at all levels is a concern of leaders and adult educators.

Strategic thinking is a distinctive leadership activity oriented toward the discovery of novel, imaginative, competitive strategies and envisioning significantly different futures (Heracleous, 1998). Strategic thinking is different from day-to-day management thinking, which is referred to as operational thinking, in that it is longer-term, takes a broader view, and focuses at the high level of key issues (Hanford, 1995).

Literature Review

Strategic Thinking

Strategic thinking has been in the literature for decades; however, because the term is often used interchangeably with strategy, strategic management, and strategic planning, its meaning needs to be clarified. Mintzberg (1994) emphasizes that “strategic planning isn’t strategic thinking. One is analysis, and the other is synthesis” (p. 107). Strategic thinking is not merely another name for everything under the strategic management umbrella, but it is a particular *way* of thinking with specific and clearly discernible characteristics. Mintzberg argues that while strategic planning is the systematic programming of pre-identified strategies from which an action plan is developed, it often gets in the way of strategic thinking. Strategic thinking uses intuition and creativity, and “its outcome is an integrated perspective of the enterprise,

a not-too-precisely articulated vision of the direction” (p. 108). Mintzberg articulated three false assumptions about strategic planning: that prediction is possible, that strategies can be detached from the subjects of their strategies, and that the strategy-making process can be formalized.

Hamel and Prahalad (1989) have described strategic thinking as crafting strategic architecture. They also emphasize creativity, exploration, and understanding organizational inconsistencies. Strategic thinking involves thinking and acting within a set of assumptions and action alternatives as well as challenging existing hypotheses and options which possibly may lead to new and more opportune choices (Hamel & Prahalad, 1989).

According to Mintzberg (1995), strategic thinking is the ability to “see through” and consists of three sets of components:

- Seeing ahead-seeing behind (having a good vision of the future based on an understanding of the past);
- Seeing above-seeing below (having a “helicopter” perspective, from a wide scope, then taking a walk to see reality); and
- Seeing beside-seeing beyond (having lateral thinking and the capacity to envision the future). (p. 79)

Strategic thinkers are described as “visionaries” who “can see differently from other people and pick out the precious gems that others miss” (Mintzberg, 1995, p. 81). The ability to see those “gems” depends on the ability to use intuition and creativity to synthesize (Mintzberg, 1995). The outcome of strategic thinking is a broad vision of direction or an integrated perspective (Mintzberg, 1995). Strategy theorists have stated that strategic thinking requires complex thinking, inductive thinking, lateral thinking, critical and logical thinking, intuition, creativity, interpreting, analyzing and applying information, and mental elasticity (Liedtka, 1998; Mintzberg, 1995; Stumpf, 1989). Together these observations help create a picture of the many different kinds of mental processing needed for strategic thinking.

Liedtka’s (1998) model defines strategic thinking as a particular *way* of thinking with five specific and clearly identifiable characteristics: a systems

perspective, a focus on intent, thinking in time, hypothesis driven, and intelligently opportunistic. According to Liedtka (1998), the strategic thinker remains open to emerging opportunities both to accomplish the stated strategy and also to continually examine the appropriateness of that strategy. The holistic perspective allows the thinker to redesign processes for greater efficiency and effectiveness. The focus on intent will make the thinker and the organization more determined and less distracted. The ability to think in time will improve the quality and the speed of decisions made and implemented. The skill to generate and test hypotheses will develop both critical and creative thinking. Intelligent opportunism will allow the thinker to be responsive to local opportunities.

By combining Liedtka’s (1998) requirements, Mintzberg’s (1978) ideas, and Hanford’s (1995) operational-strategic thinking comparison, strategic thinking can be understood as being: (a) conceptual: reflecting ideas, models, and hypotheses, (b) systems-oriented: taking into account the interaction of the organization’s parts as well as its relationship with the external environment, (c) directional: providing a sense of an aimed-for future state which is different from the present, and (d) opportunistic: taking advantage of the organization’s past achievements and present competitive and environmental conditions. Learning to think strategically is described as a “messy process of informal learning” (Mintzberg, Ahlstrand, & Lampel, 1998, p. 108).

Adult Learning Theory

Adult learning considers the role of experience in what, when, how, and why adults learn (Knowles, Holton, & Swanson, 2005; Merriam, Caffarella, & Baumgartner, 2007). As noted by Lindeman (1926), “experience is the adult learner’s living textbook” (pp. 6-7). Planned and unplanned events; formal and informal learning situations occurring at work, at home, and in the community; as well as real or replicated situations like simulation, role plays, games, case studies, and demonstrations all make up the array of experiences that shape adults’ experience (Knowles, Holton, & Swanson, 2005). How experience affects the

learning process varies across the major theoretical orientations to learning (Merriam, Caffarella, & Baumgartner, 2007). The constructivist approach to learning, which focuses on the individual's creation of meaning from experience, may be best suited to the ill-defined nature of situations leaders face in strategic thinking (Mintzberg, 1994).

Kolb's (1994) experiential learning theory is a four-step cycle of concrete experience, observation of and reflection on that experience, formation of abstract concepts based upon the reflection, and testing the new concepts. These four elements are the essence of a spiral of learning that can begin with any one of the four elements but that typically starts with a concrete experience. For learners to be effective in constructing knowledge, all four of the steps in experiential learning theory are to be experienced: involvement in concrete experiences, reflection and observation of such experiences, creation of abstract concepts integrating observations into sound theories, and active experimentation to test the theories in decision making (Kolb, 1984).

According to Goldman (2007) and others, the ability to think strategically develops gradually over a lengthy period of time of usually more than 10 years (Ericsson, 1996; Ericsson, Krampe, & Tesch-Romer, 1993; Ericsson, Prietula, & Cokely, 2007). Strategic thinking, according to Hansman (2001), may be the result of experiential learning (doing in order to learn) and situation cognition (interacting in a socio-cultural context), so learning cannot be separated from context.

Methods

This qualitative study was derived from 24 in-depth interviews conducted in 10 cities within 6 states in the western United States. Using elite interviewing (Marshall & Rossman, 1999) 10 purposely selected participants were chosen using the following selection criteria: (a) earned at least a bachelor's degree; (b) been a senior minister with responsibility for organization-wide strategy for at least 10 years; and (c) viewed as a "successful" minister with success defined as the weekly attendance has increased or new churches were started from the church during the minister's tenure;

and (d) viewed as having expertise in strategic thinking by other ministers who have worked with them. Each participant was interviewed at least twice, and interviews lasted from 90 minutes to two-and-a-half hours.

The criterion of 10-years experience is from the research on expertise that indicates at least 10 years as the minimum timeframe for expertise to develop (Ericsson et al., 1993). Participants ranged in ministry experience from 22 to 50 years. They ranged in experience as senior ministers from 16 to 48 years. The participants are representative of minister gender, geographical regions of the western United States, and various denominations. Two of the participating ministers were Catholic and eight were Protestant. Of the Protestant ministers, five were non-denominational, two were Nazarene, and one was Presbyterian. Of the participants, one was a woman. All have bachelor's degrees, eight have master's degrees (several have multiple master's degrees), and four have doctoral degrees. All the participants have held or currently hold positions as senior ministers of a church which has at least 500 regular attendees and which has grown under the minister's leadership. This size criterion was based on Odom and Boxx's (1988) study which stated that ministers of large and growing churches tend to pursue more formal strategic planning. Also, research on church size dynamics indicates the complexity of large and very large churches require more strategic thinking than small and medium sized churches (Gaede, 2001; Keller, 2006; McIntosh, 1999).

Analysis focused on identifying the experiences that were important to strategic thinking development, what facilitated and impeded the development of strategic thinking, and how strategic thinking developed over time. The following focuses on the experiences the participants identified as most critical to their strategic thinking development.

Findings

Participants portrayed their strategic thinking as a process that evolved over time with many of the experiences intertwined. Several participants said that in their first 10 years of ministry they were developing

knowledge and experience but they were not strategic. These are years of creating the knowledge base, which is in keeping with the literature on expertise development (Ericsson, 1996; Ericsson et al., 1993; Ericsson et al., 2007; Goldman, 2005).

None of the participants was comfortable depicting their development as a linear or systematic process. They could identify the key influences and events that helped their thinking develop but did not want to define

it as a step-by-step process.

Each participant had a unique set of experiences and named a distinctive set of contributing factors to their strategic thinking development. Each of these eight experiences was repeated by at least four of the participants. These eight experiences are presented here in order of those mentioned most often in one way or another. Table 1 exhibits the important characteristics of each of the eight experiences.

Table 1. Important Characteristics of Eight Experiences

Experiences Contributing to Strategic Thinking	Important Characteristics
Being Mentored	Experienced strategic thinking minister Affirming relationship Facilitates reflective practice
Other Ministers	New ideas Mutually supportive colleagues
Spiritual Discernment	Listening to God Putting situations into biblical context
Education	New ideas Challenging assumptions Learning to think critically
Practical Ministry Experience	Variety Repetition Responsibility
Challenging Experiences	Significant organizational impact Responsibility Required focus
Experience in Other Cultures	Challenging assumptions Learning to listen
Reading Books	New ideas Challenging assumptions

Being Mentored

Many of the participants believe Being Mentored was critical to their strategic thinking development. Many had a mentor or multiple people who were important to their development of strategic thinking, but even those who did not have a mentor themselves believed it was vital to strategic thinking development. Mentoring is most critical early in one's profession. Seeking out more advanced strategic thinkers was

helpful to developing those skills (Ericsson et al., 2007). Some mentioned their fathers, professors, the first minister for whom they worked, other senior ministers, and individuals they were mentored by. Mentors are well-informed coaches who are supportive yet willing to challenge the mentee by asking thoughtful questions (Ericsson et al., 2007).

Experienced strategic thinkers can be invaluable to the strategic thinking development of novices. Effective mentoring provides an affirming relationship, honest

and objective feedback, systems thinking, a challenge to one's thinking, and reflective practice. An excellent mentor was described as a more experienced, successful leader who loves to learn and has a desire to mentor other ministers.

Other Ministers

Relationships with other ministers contributed to the strategic thinking development for all of the participants. While mentorships involved a more experienced, wiser person pointing the way and stimulated diverse thinking, these peer-to-peer relationships provided participants the ability to share openly about specific challenges they face, allowed them to learn vicariously through the experience of others, and helped them think through situations they face more strategically. Several stated this is the most important influence in their strategic thinking at this stage in their careers.

Some participants described a confidante; some identified a mutually supportive group of ministry friends with whom they can share anything; some mentioned a less intimate set of relationships. All of these allowed them to share ministry-specific issues that helped them develop strategic thinking. While a minister may feel like everybody else's counselor, having minister friends with whom there is a level of trust and confidence provides a safe outlet and sounding board. These relationships contain a high degree of trust with people with whom they can and do call or meet with on a regular basis.

These mutually supportive relationships with other ministers inspire participants to think more broadly, to be exposed to new ideas, and to prepare for issues before they face them. Mentors and other ministers had a significant influence on how much participants learned from their experiences because they provided opportunities for dialogue and reflection.

Spiritual Discernment

Spiritual discernment is a process that integrates prayer and knowledge of the Bible with decision-making, taking the process of strategic thinking

“beyond what is rational or political to the level of the sense of the promptings of the Holy Spirit” (Coghlan, 1987). Each participant mentioned prayer and knowledge of the Bible as being a part of their strategic thinking development although how Spiritual Discernment was experienced varied by denomination and theological tradition. Some viewed prayer as the most critical element in strategic thinking for their organizations. Spiritual Discernment was described by participants as something they have observed, encountered, or undergone personally. Spiritual Discernment was a repeated experience in which they receive clarity. Spiritual Discernment is a discipline. It is done regularly, but rather than being described as an acquired behavior or a customary practice, it is something that is encountered anew on a repeated basis.

Kunz (2011) described spiritual discernment as a “transformative process of divine-human cooperative imagination” and a “decision-making process, a process of discovering and choosing that leads to action” (p. 176). According to Horton's (2009) research, there are three primary approaches to discernment: the bull's eye method, the wisdom approach, and the relationship-formation approach. The bull's eye method asserts that God has a perfect detailed plan for all individuals and seeks to reveal that plan to them. The wisdom approach theorizes that Christians should rely on their reasoning abilities, wise counsel, and a clear assessment of their strengths, talents, and abilities. The relationship-formation approach emphasizes an intimate relationship with God, and its proponents believe that God does not have a predetermined specific path for Christians' lives but rather they have a great amount of freedom. These free decisions are made out of a deep relationship with God who continuously provides guidance and interacts with people, but God does not dictate their every move. Regardless of which of these three discernment approaches are followed by participants in this study, they all view Spiritual Discernment as a key part of their strategic thinking development. An ongoing process of praying to listen for God's direction and putting situations into a biblical context are an important part of any decision about the ministry; many of the participants' strategies and ideas arose from prayer.

Education

Education was an experience noted by several of the participants as contributing to their strategic thinking development. Some mentioned their strategic thinking would not be what it is without the education they received. For most of the participants, a variety of educational experiences worked together to develop their strategic thinking. Most put the greatest value on the postgraduate education they received after they had practical experience in ministry. Adult learners are motivated when the learning is something they need to know, when they can learn by experience, and when learning is relevant to their work or personal life (Knowles, Holton, & Swanson, 2005). Most mentioned leadership, management, and business classes as the ones that developed strategic thinking. Others attributed their development of strategic thinking to scientific courses of study or those that stimulated critical thinking skills of analysis and synthesis.

Education developed strategic thinking by providing new ideas, challenging assumptions, and requiring learners to use a variety of thinking skills—logical thinking, analytical thinking, creative thinking, and interpretation. Participants valued the dialogue and interaction with other students that challenged their assumptions.

Practical Ministry Experience

Practical Ministry Experience was a term used to describe the variety of situations and activities participants experienced during their 22 to 50 years in ministry. These were specifically experiences over which the participants were in charge and had decision making responsibility. This is in keeping with Stumpf's (1989) findings of work experiences that stretch strategic thinking: when one is in a lower level management position the typical work day consists of solving problems or taking care of pressing issues, whereas being responsible for the entire organization creates an urgency and concern for the longer-term aspects of the organization and gives a broader view of the whole picture. The important characteristics about Practical Ministry Experience that contributed to the

development of the participants' ability to think strategically were variety and repetition, coupled with the practice of reflecting on experiences.

Variety

Many participants attribute the development of their strategic thinking to the wide variety of issues they have faced. Some participants found that rotating jobs in various ministries and locations gave them a breadth of experience that enabled them to see patterns in action. One participant said because of a "wide variety of business and ministry assignments", it has been beneficial to ask oneself, "What have I seen like this before that has succeeded or failed?" This developed a practice of adapting and recreating for the situation currently faced. Another participant stated strategic thinking "expanded as my ministry and life experience has expanded. I have dealt with issues I never imagined, many I didn't ask for, but they have all added to my knowledge and helped me see more broadly."

By serving as consultants to many other churches, two participants were exposed to many ministries from a "balcony view" that has contributed to them developing a broader, more strategic mindset of their own ministries. The variety of interactions with multiple organizations gave them a perspective and an ability to see similar patterns and concepts.

Repetition

Many participants believe their strategic thinking developed considerably as they saw many of the same issues come around again and again. They anticipated and continually devised new ways to deal with these recurring matters. Some ministers stated that having worked in one church or ministry for many years and dealing with repeated situations has allowed them to build their strategic thinking.

Experience in Other Cultures

Several participants believe their experience working with and in other cultures has taught them to respect divergent thinking and to envision and expand

different perspectives, which were critical to strategic thinking. These experiences taught them to relate broader concepts and identify different possibilities for the future. The experience of traveling, living, and teaching in other cultures exposed them to contrary views and caused them to “hear things with different ears” and to become better listeners. These experiences made them more aware of other cultures and subcultures and made them more attentive to societal trends taking place where they live.

One participant mentioned strategic thinking increased by “learning to listen to other people’s wisdom and respect their culture. This helps me move beyond frustration, to be more attentive, and to recognize and employ different strategies to reach the ultimate goal.”

Experience in Other Cultures developed strategic thinking through exposure to people with very different value systems, thereby causing these participants to examine their own assumptions and become better listeners. Visiting, traveling, teaching, and living in other cultures brought perspective transformation (Mezirow, 1991) that has led to value and behavioral shifts.

Challenging Experiences

Participants noted that facing difficult challenges of significant magnitude accelerated their strategic thinking abilities. They gave examples such as starting a church, becoming the senior pastor, launching a major building project, dealing with economic downturns, formulating complex budgets, working through financial troubles, facing difficult personnel decisions, experiencing personal traumas, dealing with financial disasters, working through legal matters, and working with outside consultants. The significance and urgency of the situation brought focus and necessitated new ways of thinking. Participants learned quickly as they accommodated these new challenges by asking thought-provoking questions of a wide range of people to diagnose the situation and respond in an unfamiliar situation. These challenging situations caused them to see the bigger picture, deal with multiple stakeholders and their competing agendas, and generate options. In

reflection, participants recognized these pressure situations were critical to strategic development. In describing these challenging situations, participants highlighted the need to stick to convictions and values, remain emotionally under control, and rely on prayer.

Challenging situations pushed participants to the edge of their comfort zones, yet these situations stretched leadership and strategic thinking capacity. These challenging situations contributed to strategic thinking because they were new experiences for the participants, had significant impact on the organization, and required focus.

Reading Books

Several participants mentioned the key role that Reading Books played in their strategic thinking development by challenging them to think more deeply, critically, and broadly. All of the participants were avid readers, which seemed to be motivated by a strong desire to learn. One participant believes the habit of “mind development” has been vital to strategic thinking development, which includes a habit of spending an hour reading on a variety of topics every night.

Participants read books on a broad variety of topics, but many mentioned leadership, management, and organizational books as directly contributing to their strategy abilities. Books contributed to strategic thinking by providing new ideas and insights and challenging the reader’s assumptions.

These participants emphasized the importance of learning with and through others and of having developed a greater awareness of organizational and external issues as their thinking developed. Researchers (Goldman, 2005; Liedtka, 1998, 1999; Liedtka & Rosenblum, 1998) have stated strategic thinking is an individual activity applied in the organizational context with other people contributing to the learning process. The eight key experiences found in this study cross all levels of interaction—personal, interpersonal, organizational, and external.

These participants indicated that the ability to think strategically may be inherent, an ability they were born with at least in some part; many believed some element of “hard wiring” or “gifting” made strategic thinking

easier for them. However, each believed that years of multiple experiences and practices are still required to hone strategic thinking even for those who may be gifted. As expertise developed over the years and through these experiences, they described developing intuition, an ability to perceive meaningful patterns and being able to understand and dissect a problem at a much deeper and broader level (Chi, Glaser, & Farr, 1988).

Participants referred to their desire to learn as being an important factor in their strategic thinking. Whether it is reading on a variety of topics, pursuing further education, or learning more about self and others, expert strategic thinkers seemed to have a strong desire to seek knowledge.

Recommendations

Findings of this research might be helpful in the development of strategic thinking for leaders in other industries. Based on this study's findings, there are three recommendations for educators and trainers. First, multi-cultural experiences can be incorporated into leadership development courses to initiate the exposure to divergent views and to facilitate envisioning and expanding perspectives.

Second, novices can be paired with a mentor to help enhance their strategic thinking. *Being Mentored* enhanced development at each stage of their careers, but the first assignment was most critical. The best mentors are the more experienced, successful leaders who are continual learners themselves with a desire to develop less experienced individuals according to participants in this study. These senior leaders provide the novice an ongoing opportunity to reflect on the experience and to have their performance assessed, their assumptions challenged, and systems thinking accelerated. Research (Ericsson et al., 2007; Vogel & Finkelstein, 2011) indicates and this study's participants also noted that experts attribute much of their development to having been mentored.

Third, novice leaders can be put in charge of projects and can be provided with supervision and data-driven, objective, timely feedback on their performance to help them develop their strategic thinking ability.

Participants in this study believed that their strategic thinking development was accelerated by the experience of goal setting; by planning; by developing budgeting skills; by working with other staff members, volunteers, and community members; by executing the project; and by then having a quantifiable assessment of the project with chance to reflect on the results. They believed this experiential learning process of experiencing, reflecting, conceptualizing, and preparing to do better next time is an often overlooked practice that is significant to critical thinking and strategic thinking.

Conclusion

Many recognize the need for more strategic thinkers, but there is little research available to bear out how these skills are developed. This study points out concrete experiences that 10 expert strategic thinkers have said were important to their strategic thinking development and offers recommendations for adult educators seeking to help leaders to enhance these skills. As this and other studies point out, individuals need a basis of domain knowledge (Ericsson, 1996; Ericsson et al., 1993; Ericsson et al., 2007) and variety of experiences to develop conceptual, systems-oriented, directional, and opportunistic thinking to become strategic thinkers (Goldman, 2005, 2007; Hanford, 1995; Liedtka, 1998; Mintzberg, 1978). This study points out that mentoring, dialogue with professional colleagues, education, practical experience, challenging experiences, dealing with other cultures, and reading business and strategy books can accelerate one's strategic thinking development.

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